Ticklers: Creation and Removal

Case Ticklers:

Topic:	Amendments
Tickler name:	**1st Rqst for Documentation Not Received**
Description:	This tickler reminds the worker that a request for documentation for an amendment (adoption assistance or subsidized guardianship) has been sent and has not been received back from the family.
How is it created:	The tickler is created when a worker saves the Amended Agreement page with a row in the Documentation group box where the Type is "Request for Documentation Sent".
How is it removed:	The tickler is deleted in the following scenarios: 1. A new row is entered on the Amended Agreement page in the Documentation group box where the Type is "Request for Documentation Sent." 2. A new row is entered on the Amended Agreement page in the Documentation group box where the Type is "Requested Information Received". 3. A new row is entered on the Amended Agreement page in the Documentation group box where the Type is "Signed Amended Agreement Received" and the Date is equal to or after the earliest date entered for a row with Type of "Request for Documentation Sent." 4. The Amended Agreement is Not Approved.
Additional comments:	The tickler will display on the desktop of the primary assigned caseworker 7 days prior to the due date (45 days after the date entered in the Date field for that row). The tickler will display as a hyperlink to the associated Amended Agreement page.

Topic:	Amendments
Tickler name:	**2nd Rqst for Documentation Not Received**
Description:	This tickler reminds the worker that a second request for documentation for an amendment (adoption assistance or subsidized guardianship) has been sent and has not been received back from the family.
How is it created:	The tickler will be created when a worker saves an Amended Agreement page with a second row in the Documentation group box where the Type is "Request for Documentation Sent" (i.e. at least two rows of this type are displayed on the page).
How is it removed:	The tickler is deleted in the following scenarios: • A new row is entered on the pending Amended Agreement page in the Documentation group box for which the Type is "Signed Amended Agreement Received" or "Requested Information Received". • OR the Amended Agreement is Not Approved.
Additional comments:	The tickler will display on the desktop of the primary assigned caseworker 7 days prior to the due date (90 days from the second sending). The tickler will display as a link to the Amended Agreement record that was saved. Clicking the link will launch the Amended Agreement page in edit mode.

Ticklers: Creation and Removal

Topic:	Adoption Assistance Agreement Amendment
Tickler name:	**Amendment Agree Not Rcvd. from Family**
Description:	This tickler reminds the worker that the Amended Agreement that was sent to family for signatures has not been returned.
How is it created:	The tickler is created when the worker enters a date in the "New Agreement Letter to Family" field on the New Agreement Amendment group box of the Adoption Agreement Amendments page or when the Agreement Concluded checkbox on the Agreements and Notices page is checked.
How is it removed:	The tickler is removed when a date is entered in the "Family Returned Agreement Amendment" field on the New Agreement Amendment group box of the Adoption Agreement Amendments page or when the Agreement Concluded checkbox on the Agreements and Notices page is checked.
Additional comments:	The worker should receive the tickler 150 days after the date in the Date of Agreement field on the Agreements and Notices page or 30 days prior to the due date.
Topic:	Adoption Assistance Agreement Amendment
Tickler name:	**AA Amendment Expiration Date**
Description:	This tickler reminds the worker that the Adoption Assistance Amendment is approaching its expiration. The worker should send a reminder to the adoptive family.
How is it created:	The tickler is created when the worker enters a date in the "DHFS Authorization Date" field on the New Agreement Amendment group box of the Adoption Agreement Amendments page.
How is it removed:	The tickler is removed when the worker checks the "Expiration Reminder Sent to Family" checkbox on the New Agreement Amendment group box of the Adoption Agreement Amendments page or when the Agreement Concluded checkbox on the Agreements and Notices page is checked.
Topic:	Adoption Assistance Agreement Amendment
Tickler name:	**CPS Info Not Received**
Description:	This tickler reminds the worker that the requested information from the Child Protective Service Office has not yet been received.
How is it created:	The tickler is created when the worker enters a date in the "Request Date" field on the CPS Request Letter group box of the Adoption Agreement Amendments page.
How is it removed:	The tickler is removed when a date is entered in the "Received" field on the CPS Request Letter group box of the Adoption Agreement Amendments page or when the Agreement Concluded checkbox on the Agreements and Notices page is checked.

Ticklers: Creation and Removal

Topic:	Adoption Assistance Agreement Amendment
Tickler name:	**Expiration Reminder to Family**
Description:	This tickler reminds the worker that the Adoption Assistance (or Subsidized Guardianship) Amended Agreement is approaching its expiration.
How is it created:	The tickler will be created when an Amended Agreement receives final approval and the Decision on the Amended Agreement is 'Approved'.
How is it removed:	The tickler is deleted in the following scenarios: • The worker launches the Notification of Amended Agreement Expiration page and saves the page where a row has been inserted and the Sent checkbox for at least one row is selected. • OR the Amended Agreement is Made in Error.
Additional comments:	The tickler will display on the desktop of the primary assigned caseworker 130 days prior to the due date (12 months from the Effective Date field on the Amended Agreement). The first escalation will occur 90 days prior to the due date.

Topic:	Adoption Assistance Agreement Amendment
Tickler name:	**Request for Add. Info. not Received**
Description:	This tickler reminds the worker that the additional information previously requested from the adoptive family has not yet been received.
How is it created:	The tickler is created when the worker enters a date in the "1st Ltr. Req. Support" field on the Agreement Amendment Request group box of the Adoption Agreement Amendments page.
How is it removed:	The tickler is removed when a date is entered in the "Add. Info Rec'd" field on the Agreement Amendment Request group box of the Adoption Agreement Amendments page, or when the Agreement Concluded checkbox on the Agreements and Notices page is checked.

Topic:	Adoption Assistance Agreement Amendment
Tickler name:	**Second Request for Additional Info not Received**
Description:	This tickler reminds the worker that, after a second request, the requested information from the adoptive family has not yet been received.
How is it created:	The tickler is created when the worker enters a date in the "2nd Ltr. Req. Support" field on the Agreement Amendment Request group box of the Adoption Agreement Amendments page.
How is it removed:	The tickler is removed when a date is entered in the "Add. Info Rec'd" field on the Agreement Amendment Request group box of the Adoption Agreement Amendments page, or when the Agreement Concluded checkbox on the Agreements and Notices page is checked.

Ticklers: Creation and Removal

Topic:	AFCARS
Tickler name:	**AFCARS Exceptions – Foster Care**
Description:	This tickler is an indication that federal reporting elements are incomplete.
How is it created:	The tickler is created on open cases where the child is currently in placement (or was in placement previously and whose case is still open for services) and AFCARS data is missing, incorrect, or otherwise inconsistent with AFCARS reporting expectations. AFCARS ticklers are generated nightly.
How is it removed:	The tickler is removed when the missing AFCARS data is entered into the AFCARS Exceptions page or other designated page. Ticklers will not be removed until all AFCARS errors that produce a tickler are resolved and the nightly batch process is run.
Additional comments:	Cases subject to AFCARS reporting requirements are children or juveniles in out of home care, included court-ordered kinship care, placement cases and pre-adoptive foster care cases who were in placement for more than one day (during the AFCARS reporting cycle) and the case is not closed for services in eWiSACWIS. AFCARS ticklers prevent case closure. Please access the AFCARS User Guide on the Knowledge Web for more detailed information regarding specific AFCARS errors and how to correct them.

Topic:	AFCARS
Tickler name:	**Adoption AFCARS Exceptions**
Description:	This tickler is an indication that federal reporting elements are incomplete.
How is it created:	The tickler is created for each child where adoption AFCARS data elements are missing, incorrect, or otherwise inconsistent with AFCARS reporting expectations. AFCARS ticklers are generated nightly.
How is it removed:	The tickler is removed when the missing AFCARS data is entered into the AFCARS Exceptions page or other designated page. Ticklers will not be removed until all AFCARS errors that produce a tickler are resolved and the nightly batch process is run.
Additional comments:	The adoptive parents' exception and tickler processing will depend on whether the adoptive mother and the adoptive father are documented in the child's record: - If both the mother and father are documented, the batch program will generate an exception (and tickler) for element #22 (Adoptive Family Structure), if the marital status is not 'Married Couple,' 'Legally Separated,' or 'Unmarried Couple' on the Person Management record for the mother and father. It will also generate an exception (and tickler) for elements #23, 24, 25, 26, 27 and 28, only if these values are missing from the adoptive parents' Person Management records. - If only the mother is documented, the batch program will generate an exception (and tickler) for element #22, if the marital status is not 'Single Female' on the adoptive mother's Person Management record. It will also generate an exception for elements #23, 25, and 26, if these values are missing from that same Person Management record. - If only the father is documented, the batch program will generate an exception (and tickler) for element #22, if the marital status is not 'Single Male' on the adoptive father's Person Management record. It will also generate an exception (and tickler) for elements #24, 27, and 28, if these values are missing from that same Person Management record. - If neither the mother nor the father is documented, the batch program will generate an exception (and tickler) for elements #22-28.

Ticklers: Creation and Removal

Topic:	Assessment
Tickler name:	**Initial Assessment Due**
Description:	This tickler reminds the worker than an Assessment must be completed for a screened in CPS Report Access Report.
How is it created:	The tickler is created when the CPS Report Access Report is linked to an existing case or used to create a case.
How is it removed:	The tickler is removed when the assessment has received supervisory approval.
Topic:	Assessment
Tickler name:	**Assessment Extension**
Description:	This tickler reminds the assessment worker to complete the assessment by the date specified in the Extension Completion field in the Time Frame (dates) group box on the Extension page (launched from the Basic tab of the Assessment page).
How is it created:	The tickler is created when an assessment extension receives supervisory approval.
How is it removed:	The tickler is removed when the assessment has received supervisory approval.
Topic:	Assessment
Tickler name:	**Create Notice of Right to Hearing/Appeal**
Description:	This tickler reminds the assessment worker to create the Notice of Right to Hearing/Appeal letter for a substantiated maltreater.
How is it created:	This tickler is created immediately for the assessment worker upon the supervisor's final approval of a substantiated Assessment. A tickler is created for each individual maltreater and contains the maltreater's person ID.
How is it removed:	This tickler is removed when the Notice of Right to Hearing/Appeal letter is created, the 'Sent' checkbox is selected, and the record is saved.
Additional comments:	The tickler cannot be deleted through Tickler Management. A case cannot be closed if there is an outstanding tickler.
Topic:	Assessment
Tickler name:	**90-Day Summary Report for Serious Incident**
Description:	The tickler reminds the worker to complete a 90-day summary report & send it to the Division of Safety and Permanence (DSP) when DSP finds the incident qualifies as an incident of child death, serious injury, egregious incident, or suspected suicide of a child in OHC.
How is it created:	The tickler is created when the DSP worker selects "Yes" to the serious incident qualifies question on the Serious Incident Notification page.
How is it removed:	This tickler is removed when the 90-day summary report is created via the Notices History page, the 'Sent' checkbox is selected, and the record is saved.
Additional comments:	The summary is due 60 days from the date the DSP worker selects "Yes" to the serious incident qualifies question on the Serious Incident Notification page. The tickler will prevent case closure

Ticklers: Creation and Removal

Topic:	Case/Permanency Plan
Tickler name:	**Case Plan Due – 6 months**
Description:	The tickler reminds the primary worker to complete a Case Plan 6 months from the previous Case Plan, based on the 'Plan Date' of the plan.
How is it created:	This tickler is created upon final approval of a Case/Permanency Plan of type 'Case Plan'.
How is it removed:	The tickler can be removed in the following ways: 1. A Case/Permanency Plan is approved. 2. Upon Case Closure prior to the due date of the Case Plan Due tickler. 3. Upon approval of a removal Out of Home Placement for the child, given all other active case participants with 'CW' or 'CPS' Person Type are already in an open episode (if other case participants have 'CW' or 'CPS' person type and are not in an open episode, the tickler should not be deleted).
Additional comments:	The due date will be 180 days from the Plan Date of the most recent Case Plan.

Topic:	Case/Permanency Plan
Tickler name:	**Case Plan Due – 120 Days**
Description:	The tickler reminds the primary worker to complete a Case Plan 120 days after a screened in Services Report.
How is it created:	This tickler is created upon linking a screened in Child Welfare type of Services Report to an existing case (or creating a new case) for the access participants identified as an 'Identified Child.' If a Permanency Plan tickler already exists for each access participant with a role of identified child, do not create an additional tickler.
How is it removed:	The tickler can be removed in the following ways: 1. A Case/Permanency Plan is approved. 2. Upon Case Closure prior to due date of the Case Plan Due tickler. 3. Upon approval of a removal Out of Home Placement for the child, given all other active case participants with 'CW' or 'CPS' person type are already in an open episode (if other case participants have 'CW' or 'CPS' person type and are not in an open episode, the tickler should not be deleted).
Additional comments:	If a Permanency Plan tickler already exists for each access participant with a role of identified child, this tickler will not be created.

Ticklers: Creation and Removal

Topic:	Case/Permanency Plan
Tickler name:	**Case Plan Due – 60 Days**
Description:	The tickler reminds the primary worker to complete a Case Plan 60 days after a qualifying approved Initial Assessment or Safety Assessment, Analysis and Plan.
How is it created:	This tickler is created when there is no other 'Case Plan Due' tickler due in the next 60 days and one of the following occurs: 1. Approval of a Safety Assessment, Analysis and Plan with a Final Safety Decision of "Unsafe" 2. Approval of an Initial Assessment with a Safety Assessment Safety Decision of "Unsafe" 3. Approval of an Initial Assessment with a Disposition of 'Case Opened-Ongoing CPS Svcs: Vol', 'Case Opened-Ongoing CPS Svcs: Petition', 'Case Already Opened-Ongoing CPS Svcs: Vol', or 'Case Already Opened-Ongoing CPS Svcs: Ptn'.
How is it removed:	The tickler can be removed in the following ways: 1. A Case/Permanency Plan is approved. 2. Upon Case Closure prior to the due date of the Case Plan Due tickler. 3. Upon approval of a removal Out of Home Placement for the child, given all other active case participants with 'CW' or 'CPS' person type are already in an open episode (if other case participants have 'CW' or 'CPS' person type and are not in an open episode, the tickler should not be deleted).

Topic:	Confirming Safe Environments
Tickler name:	**Confirming Safe Environments**
Description:	This tickler reminds the primary worker to complete a Confirming Safe Environments (CSE) within 10 days of a qualifying placement.
How is it created:	The tickler is created when an approved qualifying Out of Home Placement is created.
How is it removed:	The tickler is removed upon final approval of a CSE or upon final approval of a placement ending that is less than 10 days. The tickler is also removed if the Out of Home Placement is ended for the reason of "Placement Made in Error."
Topic:	Confirming Safe Environments
Tickler name:	**Confirming Safe Environments (180 Days)**
Description:	This tickler reminds the primary worker to complete a Confirming Safe Environments (CSE) within 180 days of 11.5.12 when there is an open placement as of 11.5.12
How is it created:	The tickler is created for qualifying placements that were open as of 11.5.12.
How is it removed:	The tickler is removed upon final approval of a CSE or if the Out of Home Placement is ended for the reason of "Placement Made in Error."
Additional comments:	If the Out of Home Placement ends prior to the 180 days, the tickler will not be deleted. The tickler can then be deleted via the Tickler Management by the supervisor.

Ticklers: Creation and Removal

Topic:	Eligibility
Tickler name:	**Title IV-E Eligibility Redetermination Due**
Description:	This tickler reminds the Eligibility worker that an Eligibility Redetermination must be completed.
How is it created:	The tickler is created when the Eligibility worker completes an Initial Determination or Redetermination.
How is it removed:	The tickler is removed when the Eligibility worker completes a Redetermination.
Additional comments:	This tickler should be reassigned to the eligibility unit by your supervisor.

Topic:	Independent Living
Tickler name:	**IL Assessment and IL Plan**
Description:	This tickler is created for children in placements that have been in care for any 6 months after the age of 15 to begin Independent Living Services. This tickler notifies primary workers that they have 90 days to complete the Independent Living Assessment and the Independent Living Plan.
How is it created:	The tickler is created when an Out of Home Placement exists for a child and the child has been in care for any 6 months after the age of 15.
How is it removed:	The tickler is removed when a date is entered into both the Independent Living Assessment Completed field and into the Independent Living Plan Completed date field on the Independent Living page.
Topic:	Independent Living
Tickler name:	**IL Transition to Discharge Plan**
Description:	This tickler is created for youth in AFCARS placements at the age 17 ½. This tickler notifies workers that they have 90 days to complete the Independent Living Transition to Discharge Plan.
How is it created:	The tickler is generated upon the creation of an AFCARS qualifying Out of Home Placement.
How is it removed:	The tickler will be removed once a date is entered into the 'Independent Living Transition to Discharge Plan Completed' field on the Assessment/Plan tab of the Independent Living page or when the only placement is ended with a reason of 'Placement Made in Error.'
Additional comments:	The tickler will prevent case closure but can be deleted by the primary worker's supervisor.

Ticklers: Creation and Removal

Topic:	Independent Living
Tickler name:	**NYTD 17 Survey**
Description:	This tickler is created for youth in placement at their 17th birthday, or if youth are placed into out of home care any time after their 17th birthday. This tickler notifies primary workers that they have 45 days after the youth's 17th birthday to complete the NYTD survey accessed via the Outcomes tab on the Independent Living page.
How is it created:	Created when an AFCARS qualifying OHP is approved and another NYTD tickler does not already exist.
How is it removed:	Can be removed in four ways: 1. Once a 17 year old NYTD survey is loaded into eWiSACWIS from the survey tool; 2. When a worker selects the 'Youth did not complete the survey' checkbox with an associated reason on the Outcomes tab of the Independent Living page; 3. The youth's OHP is ended prior to the display date; 4. The youth's OHP (at the time the youth was between 17 – and 17 and 45 days) is ended with the ending reason: 'Placement Made in Error.'
Additional comments:	If a child enters out of home care after the age of 17, this tickler is created. If the Begin Date of the Out of Home Placement is beyond 45 days from the youth's 17th birthday, the tickler is not created.

Topic:	Legal
Tickler name:	**Report to the Court Due**
Description:	This tickler reminds the primary worker to complete a court ordered study by the date specified in the Report Due field on the Legal Status page.
How is it created:	The tickler is created when a date is entered into the Report Due field on the Legal Status page and the verified checkbox is checked.
How is it removed:	The tickler is removed when a date is entered in the Report Submitted field on the Legal Status page.

Ticklers: Creation and Removal

Topic:	Ongoing Services
Tickler name:	**Intensive In-Home**
Description:	This tickler Informs the primary worker that the Intensive In-Home Services for the case are ending in 30 days. The purpose of this is to allow you to determine and secure an extension, if applicable, prior to the actual end date.
How is it created:	The tickler is created when the program Designation on the Maintain Case page = Intensive In-Home and the Extended checkbox is not checked on the Program page. It is also created when the primary assignment's type and responsibility are Intensive In Home.
How is it removed:	This tickler is deleted in the following instances: 1. When the Extended checkbox is selected and the Program page is saved. 2. When the program designation on the Program page is no longer 'Intensive In-Home.' 3. When the last remaining case participant with 'Rsp' checkbox checked who is also selected as a participant on the Program page is deactivated or removed. 4. When the primary assignment to the case with a Type other than 'Intensive In-Home' is created. 5. When a new Intensive In-Home Service Ending tickler is created. 6. When an Out of Home Placement is documented for a child selected as a participant on the Program page. 7. When the case is closed.

Topic:	Placement
Tickler name:	**VPA - Foster Home**
Description:	This tickler reminds the worker that the Voluntary Placement Agreement – Foster Home is about to expire and the child needs to be placed in an alternate placement.
How is it created:	This tickler will be created when the worker creates a VPA- Foster Home using the Agreements and Notices page. The tickler will have a due date of 180 days after the date entered in the "Date of Agreement" field on the Agreements and Notices page.
How is it removed:	The tickler is removed when the worker checks the Agreement Concluded checkbox and enters an end date in the "Agreement End Date" field on the Agreements and Notices page.
Additional comments:	The worker should receive the tickler 150 days after the date in the Date of Agreement field on the Agreements and Notices page or 30 days prior to the due date.

Topic:	Placement
Tickler name:	**Re-evaluate Interim Care**
Description:	This tickler reminds the primary worker to end the 'Interim Care' Out of Home Placement after the end of the 12th month from the termination of the specified child's subsidized guardianship agreement.
How is it created:	The tickler is created upon final approval of an 'Interim Care' Out of Home Placement.
How is it removed:	The tickler is deleted when the placement ending for the 'Interim Care' Out of Home Placement is approved.

Ticklers: Creation and Removal

Topic:	Planning
Tickler name:	**30-Day CANS**
Description:	This tickler is to remind the primary worker to complete an Out of Home CANS within 30 days of a new qualifying placement.
How is it created:	The tickler is created upon final approval of a qualifying Out of Home Placement, if there is no outstanding 30-Day CANS tickler for the child from a previous placement; or, upon final approval of an Out of Home CANS for a previous placement and an outstanding 30-day tickler was deleted.
How is it removed:	The tickler is removed upon final approval of an Out of Home CANS or upon final approval of a placement ending that is considered a discharge within 30 days of removal. The tickler is also removed if the Out of Home Placement is ended for the reason of "Placement Made in Error."
Additional comments:	The due date will be 30 days from the Placement Begin Date on the Out of Home Placement page.

Topic:	Planning
Tickler name:	**6-Month CANS**
Description:	This tickler reminds the primary worker to complete a subsequent Out of Home CANS within 6 months of a previous Out of Home CANS.
How is it created:	The tickler is created upon final approval of an Out of Home CANS if the Out of Home Placement is still open.
How is it removed:	The tickler is removed upon final approval of an Out of Home CANS for the child's current open placement. The tickler is also removed upon final approval of a placement ending (discharge or not) and for the End Reason of "Placement Made in Error."
Additional comments:	The due date will be 180 days from the Effective Date of the most recent Out of Home CANS.

Topic:	Planning
Tickler name:	**ASFA Exceptions**
Description:	This tickler reminds workers to complete the ASFA Exceptions page at the 15th month when the child has reached the 15/22 month out of home.
How is it created:	Tickler is created upon creating or ending an Out of Home Placement.
How is it removed:	The tickler can be removed in the following ways: 1. When a Permanency Plan - ASFA Exceptions page is created and approved OR 2. When a TPR filed date is entered on the Legal Action page (for Legal Actions of Request for TPR, TPR Petition Involuntary, and TPR Petition Voluntary) OR 3. Upon approval of the case closure.

Ticklers: Creation and Removal

Topic:	Planning
Tickler name:	**Permanency Hearing**
Description:	This tickler reminds the primary worker to complete a Permanency Plan Hearing within one year of the removal from home date and every year thereafter, as long as the child remains in out of home care.
How is it created:	The initial Permanency Plan Hearing tickler is generated when an Out of Home Placement is created, a date is entered in the 'Date removed from his or her home' field, the placement is a removal from home, and the placement is approved. For every consecutive Permanency Plan Hearing tickler, the due date is calculated 12 months from the date entered on the 'Date of Hearing or Review' field located on the Basic Tab of the Permanency Plan Review or Hearing Results page.
How is it removed:	The tickler can be removed in the following ways: 1. A Permanency Plan Hearing (12 months) is created and approved on the Permanency Plan Review or Hearing Results page. 2. The Out of Home Placement is ended and a value is entered in the 'Discharge Reason' field on the Service Ending pop up for the placement. 3. The Out of Home Placement is ended with the ending reason: 'Placement Made in Error.'

Topic:	Planning
Tickler name:	**Permanency Plan Due**
Description:	This tickler reminds the primary worker to complete a Permanency Plan within 60 days of the child's initial placement date.
How is it created:	The tickler is created when an Out of Home Placement is created, a date is entered in the 'Date removed from his or her home' field, the placement is a removal from home, and the placement is approved.
How is it removed:	The tickler can be removed in the following ways: 1. A Permanency Plan with a later date is created and approved. 2. The Out of Home Placement is ended and a value is entered in the 'Discharge Reason' field on the Service Ending pop up for the placement. 3. The Out of Home Placement is ended with the ending reason: 'Placement Made in Error.'

Ticklers: Creation and Removal

Topic:	Planning
Tickler name:	**Permanency Review**
Description:	This tickler reminds the primary worker to complete a Permanency Plan Review within 6 months of the removal from home date and every 6 months thereafter, as long as the child remains in out of home care.
How is it created:	The initial Permanency Plan Review tickler is generated when an Out of Home Placement is created, a date is entered in the 'Date removed from his or her home' field, the placement is a removal from home, and the placement is approved. For every consecutive Permanency Plan Review tickler, the due date is calculated 6 months from the date entered on the Hearing/Review Date located on the Basic Tab of the Permanency Plan Review or Hearing Results page.
How is it removed:	The tickler can be removed in the following ways: 1. A Permanency Plan Review (6 months) or Permanency Plan Hearing (12 month) is created and approved on the Permanency Plan Review or Hearing Results page. 2. The Out of Home Placement is ended and a value is entered in the 'Discharge Reason' field on the Service Ending pop up for the placement. 3. The Out of Home Placement is ended with the ending reason: 'Placement Made in Error.'

Ticklers: Creation and Removal

Topic:	Subsidized Guardianship
Tickler name:	**1st Request - Continued Eligibility**
Description:	This tickler reminds the worker to send the Annual Eligibility Determination to the family.
How is it created:	The tickler is created by an automated batch program. The batch will look to determine if the child has: • An open Subsidized Guardianship service and • A Legal Status record where New Legal Status = Guard. to Relative/Caretaker (48.977) and • An approved Subsidized Guardianship Eligibility Determination <u>DOES NOT</u> exist where the day and month of Effective Date is within 90 days of the day and month Hearing Legal Status Date. The batch creates this tickler 70 days before each Annual Review due date.
How is it removed:	The tickler is removed in the following scenarios: • A worker launches the AA/SG Eligibility Notices and Decisions page; selects Document Name = 1st SG Request for Information to Determine Continued Eligibility; selects the checkbox beside the row on the page that corresponds to the case where the tickler occurs, then clicks the Save button. • OR a worker launches the Subsidized Guardianship Eligibility page and saves a row on the Notices and Decisions Template History tab where the Document Name = 1st SG Request for Information to Determine Continued Eligibility. • OR the Subsidized Guardianship Eligibility is terminated. • OR the Annual Review is approved.
Additional comments:	The tickler will display as a link to the Subsidized Guardianship Eligibility page on the desktop of the primary assigned case worker 10 days prior to the due date (which is 60 days prior to the Annual Review due date, the anniversary of the Hearing/Legal Status Date). Therefore, the tickler will display as soon as it is created.

Ticklers: Creation and Removal

Topic:	Subsidized Guardianship
Tickler name:	**2nd Request - Continued Eligibility**
Description:	This tickler reminds the worker to resend the Annual Subsidized Guardianship Eligibility Determination to the family.
How is it created:	The tickler is created by an automated batch program. The batch will look to determine if the child has: • An open Subsidized Guardianship service and • A Legal Status record where New Legal Status = Guard. to Relative/Caretaker (48.977) and • An approved Subsidized Guardianship Eligibility Determination <u>DOES NOT</u> exist where the day and month of Effective Date is within 90 days of the day and month Hearing Legal Status Date.
How is it removed:	The tickler is removed in the following scenarios: • A worker launches the AA/SG Eligibility Notices and Decisions page; selects Document Name = 2nd SG Request for Information to Determine Continued Eligibility; selects the checkbox beside the row on the page that corresponds to the case where the tickler occurs, then clicks the Save button. • OR a worker launches the Subsidized Guardianship Eligibility page and saves a row on the Notices and Decisions Template History tab where the Document Name is 2nd SG Request for Information to Determine Continued Eligibility to launch the notification, then saves the Subsidized Guardianship Eligibility Determination page. • OR an Annual Review is approved. • OR the Subsidized Guardianship Eligibility is terminated.
Additional comments:	The tickler will display as a link to the Subsidized Guardianship Eligibility page on the desktop of the primary assigned caseworker 40 days prior to the due date of the annual review (the anniversary of the Hearing/Legal Status Date). Therefore, the night the batch runs, if the tickler is created it will display on the worker's desktop. It is escalated 30 days prior to the due date of the annual review.

Ticklers: Creation and Removal

Topic:	Subsidized Guardianship
Tickler name:	**Annual SG Eligibility Determination**
Description:	This tickler reminds the worker to complete the Annual Review of Subsidized Guardianship Eligibility Determination in the system.
How is it created:	This tickler is created by an automated batch program. The batch will look to determine if the child has: • An open Subsidized Guardianship service and • A Legal Status record where New Legal Status = Guard. to Relative/Caretaker (48.977) and • An approved SG eligibility determination where Type = Annual Review DOES NOT exist where the day and month of Effective Date is within 90 days of the day and month Hearing Legal Status Date. The batch creates this tickler 70 days before the Annual Review due date.
How is it removed:	The tickler is removed in the following scenarios: • An Annual Review is approved. • OR the Subsidized Guardianship Eligibility is terminated.
Additional comments:	The tickler will display on the desktop of the primary assigned caseworker 40 days prior to the Annual Review due date (the anniversary of the Hearing/Legal Status Date).

Topic:	Subsidized Guardianship
Tickler name:	**SG Eligibility Termination at 18**
Description:	The tickler reminds the primary worker to send the form (Advance Notice of Termination of Subsidized Guardianship At Age 18) to the SG guardian
How is it created:	This tickler is created by an automated batch program. The batch will look to determine if the child has: • An open SG Service; AND • Turns 18 in 130 days from the system date.
How is it removed:	The tickler is deleted in the following scenarios: • A worker launches and saves the Advance Notice of Termination of Subsidized Guardianship at Age 18 from the AA/SG Eligibility Notices and Decisions page. • A worker launches and saves the Advance Notice of Termination of Subsidized Guardianship at Age 18 from the Notices and Decisions Template History tab of the Subsidized Guardianship Eligibility page. • The Subsidized Guardianship Eligibility is terminated. • The tickler is deleted from Tickler Management.
Additional comments:	The tickler will display on the desktop of the primary assigned caseworker 130 days prior to the due date (the child's 18th birthday). The tickler will be displayed as the hyperlink. Selecting the hyperlink will open the SG Eligibility page, Decisions and Notices History tab.

Ticklers: Creation and Removal

Topic:	Subsidized Guardianship
Tickler name:	**SG Eligibility Termination at 19**
Description:	The tickler reminds the primary worker to send the form (Request for Continuation for SG for a Child Over Age 19) to the SG guardian
How is it created:	This tickler is created by an automated batch program. The batch will look to determine if the child has: • An open SG service and • An open SG Service; AND • Turns 19 in 130 days from the system date; AND • Anticipated High School Graduation tab on the Education tab of the Person Management is either null or is greater than the child's 19th birthday.
How is it removed:	The tickler is deleted in the following scenarios: • A worker launches and saves the Request for Continuation for SG for a Child Over Age 19 from the AA/SG Eligibility Notices and Decisions page. • A worker launches and saves the Request for Continuation for SG for a Child Over Age 19 from the Notices and Decisions Template History tab of the Subsidized Guardianship Eligibility page. • The Subsidized Guardianship Eligibility is terminated. • The tickler is deleted from Tickler Management.
Additional comments:	The tickler will display on the desktop of the primary assigned caseworker 130 days prior to the due date (the child's 19th birthday). The tickler will be displayed as the hyperlink. Selecting the hyperlink will open the SG Eligibility page, Decisions and Notices History tab.

Topic:	Subsidized Guardianship
Tickler name:	**SG Suspension or Termination**
Description:	The tickler reminds the primary worker to send the form (Notification of Subsidized Guardianship Suspension or Termination) to the SG guardian when the SG payments are either suspended or terminated.
How is it created:	This tickler is created by an automated batch program. The batch will look to determine if the child has: • An open SG Service; AND • The most recent fully approved SG Eligibility Determination with the status of either "Suspend Payment" or "Terminate".
How is it removed:	The tickler is deleted in the following scenarios: • A worker launches and saves the Notification of Subsidized Guardianship Suspension or Termination from the AA/SG Eligibility Notices and Decisions page. • A worker launches and saves the Notification of Subsidized Guardianship Suspension or Termination from the Notices and Decisions Template History tab of the Subsidized Guardianship Eligibility page. • The Subsidized Guardianship Eligibility is terminated. • The tickler is deleted from Tickler Management.
Additional comments:	The tickler will display on the desktop of the primary assigned caseworker upon creation and is due 30 days from the date of the SG Determination with the status of "Suspend Payment" or "Terminate". The tickler will be displayed as the hyperlink. Selecting the hyperlink will open the SG Eligibility page, Decisions and Notices

	History tab.

Topic:	TPR
Tickler name:	**Review Option to Return Custody to County**
Description:	This tickler is to remind the primary worker that the order for adoption has not been completed within 2 years of the TPR.
How is it created:	The tickler is created when the date TPR was approved by the courts is entered into eWiSACWIS (starts when child is deactivated from the case for TPR).
How is it removed:	The tickler is removed when the out of home placement for the child ends for reason of 'Transfer to [County].' If custody does not transfer, the tickler will only be removed when the case is closed.

Ticklers: Creation and Removal

Provider Ticklers:

Topic:	Home Study
Tickler name:	**Home Study Status On Hold**
Description:	The tickler reminds a worker who puts a Home Study On Hold to remove the hold six months after the Effective Date.
How is it created:	The Home Study Status on Hold tickler is created when a Home Study has been placed On Hold.
How is it removed:	The tickler is removed when the Home Study Hold Status page is changed from Place on Hold to Remove from Hold.

Topic:	Home Study Recert
Tickler name:	**Home Study Status On Hold**
Description:	The tickler reminds a worker who puts a Home Study Update/Recertification On Hold to remove the hold six months after the Effective Date.
How is it created:	The Home Study Status on Hold tickler is created when a Home Study Update/Recertification has been placed On Hold.
How is it removed:	The tickler is removed when the Home Study Recert Hold Status page is changed from Place on Hold to Remove from Hold.

Topic:	Provider
Tickler name:	**Inactive Duplicate Provider**
Description:	Displays for the duplicate provider using dup provider name and ID and counts down immediately- Due in 14 days down to 0 days with no escalation.
How is it created:	The tickler is created when the worker checks the Send Reminder checkbox on the Duplicate Provider header section and successfully saves.
How is it removed:	The tickler is removed when the worker checks the Completed checkbox on the Duplicate Provider header section and successfully saves.

Topic:	Provider EFT Information
Tickler name:	**Review Provider EFT Information**
Description:	This tickler reminds the worker with the primary provider assignment in the designated County for the provider to check the payment method after a pre-note has been sent. If there is no open Primary Assignment within the provider's Designated County, then remind the worker with the latest assignment to the provider within the Designated County.
How is it created:	The tickler is created by eWiSACWIS to DOA- EFT File Extract batch program for each pre-note sent when the batch is run for the Provider's Designated County.
How is it removed:	This tickler is removed when the Out of Home Care worker from the designated County changes the Payment Method to EFT or requests another pre-note or resets the EFT Information on the Electronic Funds Transfer page.
Additional comments:	This tickler would only be used by a county utilizing EFT for provider payments. The Due Date, Reminder Date and Escalation Dates cannot be modified if the county is not using the EFT functionality.

Ticklers: Creation and Removal

Topic:	Provider License
Tickler name:	**Home License About To Expire**
Description:	This tickler reminds the primary worker that the foster home or treatment foster home license is about to expire.
How is it created:	The tickler is created when a home provider license is created.
How is it removed:	The tickler is removed when the status of the license is changed to Renewed, Revoked, Closed or Expired. For licenses expired by batch, the License About to Expire batch (b-pm04a-home-priv-lcns) will delete ticklers that were originally created to remind the worker to renew the license.

Topic:	Provider License
Tickler name:	**DOJ Background Check About To Expire**
Description:	This tickler is to remind workers to complete DOJ background checks for Parent 1 and Parent 2, and anyone with the role of Licensee.
How is it created:	When a worker completes a licensing activity application with Decision = Create License (except for Out of State licenses), eWiSACWIS will determine if there is a current DOJ background check (current means the Effective To date on the Background Check page is today or a future date). If a DOJ background check exists, a tickler will be created for the primary assigned worker 30 days before the due date of the next background check. DOJ background checks are due every four 4 years and will be calculated based on the Effective From date of the license.
How is it removed:	The tickler is removed when a background check of type DOJ is created and the Effective From date is greater than the previous Effective From date + 4 years.

Topic:	Provider License
Tickler name:	**IBIS Background Check About To Expire**
Description:	This tickler is to remind workers to complete IBIS background checks for Parent 1 and Parent 2, and anyone with the role of Licensee.
How is it created:	When a worker completes a licensing activity application with Decision = Create License (except for Out of State licenses), eWiSACWIS will determine if there is a current IBIS background check (current means the Effective To date on the Background Check page is today or a future date). If an IBIS background check exists, a tickler will be created for the primary assigned worker 30 days before the due date of the next background check. IBIS background checks are due every four 4 years and will be calculated based on the Effective From date of the license.
How is it removed:	The tickler is removed when a background check of type IBIS is created and the Effective From date is greater than the previous Effective From date + 4 years.

Ticklers: Creation and Removal

Topic:	Provider License
Tickler name:	**ICPC Background Check About to Expire**
Description:	This tickler is to remind workers to complete ICPC background checks for Parent 1 and Parent 2, and anyone with the role of Licensee on the Out of State license.
How is it created:	When a worker completes an Out of State foster home license, eWiSACWIS will determine if there is a current ICPC background check.
	If an ICPC background check exists, a tickler will be created for the primary assigned worker 45 days before the due date of the next background check.
How is it removed:	The tickler can be removed when a background check of type ICPC – Background Check is created and the Effective To date is greater than the Effective To date of the existing ICPC background check or if the ICPC -Background Check does not exist. The tickler can also be removed when a background check of the Type ICPC – Background Check is created and the Effective To date is blank.

Topic:	Licensing Private Providers
Tickler name:	**Facility License About To Expire**
Description:	This tickler is to remind workers that the facility license for a private provider is about to expire.
How is it created:	The tickler is created when a facility license is completed with a status of Active or Renewed.
How is it removed:	The tickler is removed when the status of the license is changed to Renewed, Revoked, or Closed.

Topic:	Licensing Private Providers
Tickler name:	**Send 2nd Notification to licensee**
Description:	This tickler is to remind workers when to send a 2nd notification to the licensee if continuation materials have not been returned.
How is it created:	This tickler is created when a license record with Status of 'Pending' is created.
How is it removed:	The tickler is removed when a date is entered in the 2nd Notification to Licensee field on the License Information page.

Topic:	Licensing Private Providers
Tickler name:	**Report due for complaint**
Description:	This tickler is to remind workers when a report is due for a complaint.
How is it created:	This tickler is created when a complaint record is created.
How is it removed:	The tickler is removed when a date is entered in the Completed field on the Complaint page.

Topic:	Licensing Private Providers
Tickler name:	**Background Checks Due**
Description:	This tickler is to remind workers that background checks need to be run for a private provider each time a license is issued or renewed.
How is it created:	The tickler is created when a license is created with a Status of Active or Renewed.
How is it removed:	The tickler is removed when both DOJ and IBIS background checks are created for the provider personnel with the current role of 'Applicant/Licensee' and the Date of Document displayed on the Imaging page exists between 65 days prior to or 30 days after the Effective From date on the license.

Ticklers: Creation and Removal

Topic:	Licensing Private Providers
Tickler name:	**Next Site Visit**
Description:	This tickler is to remind the primary worker to document another Site Visit.
How is it created:	The tickler is created/replaced in the following situations: • Save of a Site Visit if it has the latest "Visit Date" of all visits to that provider and either the "Next Visit Date" changed or no Next Site Visit tickler already exists for this Site Visit • Restoration of a revoked license via appeal where the tickler used to be of this type
How is it removed:	The tickler is deleted in the following situations: • Another Next Site Visit tickler is created to replace it • The provider is closed • The Facility License is closed • Approval of an Additional Licensing Action of "Close" or "Make in Error" for this provider's license • Revocation of the provider's license • The supervisor deletes it through Tickler Management

Topic:	Licensing Private Providers
Tickler name:	**Monitoring Visit**
Description:	This tickler is to remind the primary worker to document a Site Visit for Monitoring Plan.
How is it created:	This tickler is created/replaced in the following situations: • Save of a completed license • Restoration of a revoked license via appeal where the tickler used to be of this type • Save of a most recent Monitoring Site Visit on a provider with a regular license.
How is it removed:	The tickler is deleted in the following situations: • Save of a most recent Monitoring Visit • Another Monitoring Visit tickler is created to replace it (e.g. a regular license is completed) • The provider is closed • The Facility License is closed • Approval of an Additional Licensing Action of "Close" or "Make in Error" for a provider's license • Revocation of the provider's license • The supervisor deletes it through Tickler Management NOTE: This tickler is not deleted by a site visit with the Action = No Access – 2544 Not Issued OR No Access – 2544 Issued.